

# HOUSEKEEPING



- All participants are muted to reduce background noise
- Use the chat feature to ask questions
- This training is being recorded
- We will be pausing throughout the presentation to address questions
- Please be patient
- Complete the post-event evaluation



# LUNCH AND LEARN MODULE 4

Cheryl Brown, MBA

Program Advisor II, San Diego & Imperial Valley SBDC MiraCosta College

[centerinfo@miracosta.edu](mailto:centerinfo@miracosta.edu)

<https://www.sdivsbdc.org/>





Not all business is good  
business!

# LET'S REVISIT



## Simplified Competitive Process

\$0 - \$2,500

P-Card

\$2,500 - \$250,000

Request for Quote (RFQ)

## Formal and Competitive

Over \$250,000

Request for Bid (RFB)

Request for Proposal (RFP)

Request for Statement of Qualifications  
(RFSQ)

Reverse Auctions (RA)

# PROPOSAL WRITING



- ❖ There is no ONE “TEMPLATE”
- ❖ Each entity is different
- ❖ Putting a proposal together takes time
- ❖ Each type of proposal is different
  - RFQ – Request for Quote
  - Request for Bid (RFB)
  - Request for Proposal (RFP)
  - Request for Statement of Qualifications
  - Qualification-Based Selection (QBS)
  - Reverse Auctions (RA)
  - Piggyback Contracting
  - Managed Competition



**100 page proposal = 50 labor hours!**

# TODAY'S DISCUSSION



## RFQ/RFB

- An RFQ is an informal procurement method for small purchases up to \$250,000 total and less than \$100,000 per year.
- RFQs are posted to BuyNet with applicable terms and conditions to solicit quotations.
- Evaluations do not require a formal committee and may consider other factors in addition to lowest price.
- Q=Best Value/B=Lowest price

## RFSQ

- An RFSQ is used to establish a pre-qualified list of potential offerors by allowing interested suppliers to show that they meet minimum qualifications or requirements to provide a material, product, or service.
- RFSQs are not binding offers, bids, or proposals.
- Rather, an RFSQ may be used to initiate a formal procurement process.

## RFP

- An RFP is a formal negotiated competitive procurement process and is the most flexible method for obtaining contracted services and certain types of goods.
- The RFP will include evaluation factors and criteria as well as their relative importance for award selection.
- Evaluation of proposals is completed by an appointed Source Selection Committee.
- Awards are made on best value in consideration of price and other factors.
- RFPs may establish minimum or pre-qualification requirements to be eligible for consideration.

OH! OH! OH!  
LET ME SEE!



# THE “PERFECT” OPPORTUNITY



If you wait for perfect conditions to  
seize an opportunity, you'll be  
waiting till the day you die.

— *Mark Batterson* —

- BEFORE YOU READ...Ctrl+F
  - Bond
  - Insurance
  - Minimum
  - Evaluation
  - Submission
  - Instructions
- Note dates
  - Published date
  - Pre-bid conference date (if applicable)
  - Question deadline
  - Bid due (date and time and time zone)



# 1<sup>ST</sup> STEP



1. Read the entire document and any attachments
2. Make note of due dates and deadlines
  - ☐ Note time zone
3. Highlight important information
  - ☐ Proposal submission instructions
  - ☐ Minimum requirements
  - ☐ Items in question



## 2<sup>ND</sup> STEP



1. Using the solicitation as a guide
2. Copy and past the requirements from the solicitation into your proposal document
3. Respond to each requirement, even if it doesn't pertain
4. Extract County provided forms
5. Pull any additional forms needed from links provided



**THIS IS  
HOW WE  
DO IT**

# CLEAN IT UP



- ✓ Double check to make sure there has been no updates/addendums
  - ✓ Check the font type and size
  - ✓ Check the paper size and margins
  - ✓ Remove any excess information
- ✓ Print, sign, and place in order with any required, agency provided documents
- ✓ Compare printed, hard copy bid with solicitation requirements
  - ✓ Proof for content
  - ✓ Proof for grammatical errors
  - ✓ Proof for administrative compliance



# GRAMMAR CHALLENGED?



<https://www.grammarly.com/>





# AFTER SUBMISSION



1. Request receipt confirmation
2. Request anticipated award announcement date
3. Ask if they will be notifying all submissions win, lose, or draw

Dear \_\_\_\_\_,

*On behalf of ABC Corporation, thank you for the opportunity to submit for the County of San Diego's RFQ for supplies and services.*

***If possible**, can you confirm that you have received ABC Corporation's proposal?*

*Also, **if possible**, do you have an anticipated award date or is March 99<sup>th</sup> still the anticipated award announcement day and will the County be notifying all submissions regardless of outcome?*





# AFTER AWARD

*“On behalf of (your company name), we want to thank you and (the agency/department) for the opportunity to submit a proposal for the (name of opportunity).*

*When it is convenient for you, we would like just 10 minutes of your time to get some **unofficial** feedback so that we can learn what we did well on our proposal and what we may need to work on for next time an opportunity with (the agency/department) presents itself so we do not make the same mistakes.”*





# NEXT STEPS?

- Review solicitations published on <https://buynet.sdcounty.ca.gov/>
- Register for Lunch and Learn Series! Module 5: You've Been Awarded a Contract, Now What? County of San Diego: <https://sdsbdc.ecenterdirect.com/events/14795>
- Want to Fast-Track? On Demand Government Contracting Series starting with On Demand! Government Contracting Series Module 1: Establishing a Foundation for Success: <https://www.sdivsbdc.org/on-demand-training-government-contracting/>

# NO COST SUPPORT



- Business Planning
- Strategic Planning
- Access to Capital
- Proposal Writing
- Capabilities Statements
- Certifications
- Startup
- Marketing
- Technology Commercialization

Live Trainings

On Demand Trainings

Virtual Trainings

One-on-One Advising

[www.sdivsbdc.org](http://www.sdivsbdc.org)





# QUESTIONS

Cheryl Brown, MBA

Program Advisor II, San Diego & Imperial Valley SBDC MiraCosta College

[centerinfo@miracosta.edu](mailto:centerinfo@miracosta.edu)

<https://www.sdivsbdc.org/>